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Leadership Lesson: Tools for Effective Team Meetings - How I Learned to Stop Worrying and Love my Team

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Effective meetings are not only integral to achieve team goals and successful completion of tasks, but also are reflective overall of team functioning (Heinemann & Zeiss, 2002). Whether they are conducted in real-time or asynchronously, in-person or by a remote conference, team meetings are important tools for managing team tasks and productivity. Effective team meetings allow for open conversation that draws upon each members' knowledge, skills, and perspectives to solve problems and to support one another in achieving the team's collective goals.

Take a moment to recall your last team meeting:

What does it look and feel like?
How well does your team function?
Who always talks and who never talks?
How does the group make decisions?
Are team members accountable for their contributions to the team?

Are you interested in improving your team's effectiveness? Meetings are critical for team development and task management. However, meetings can easily fail without adequate preparation and leadership. This Leadership Lesson presents a discussion of effective meeting practices and member actions that support team productivity. Tools for supporting effective team practices are linked from the menu for the lesson.

Effective Meeting Practices

"We must all hang together or, most assuredly, we shall hang separately."
—Benjamin Franklin

Attention to meeting preparation, facilitation, participation, and evaluation processes is the recommended approach for ensuring productive outcomes. The following meeting practices are well known to support productive team processes:

1. Organize meeting logistics
2. Distribute an agenda before the meeting
3. Start and end on time
4. Open with member check-in
5. Establish and review ground rules
6. Assign administrative roles
7. Summarize decisions and assign action items
8. Debrief: evaluate and plan for improvement
9. Distribute meeting minutes promptly

Prior to the meeting, the details of logistics—meeting location, date and time, space set-up, and technology support—need to be organized.

Advance notice: Has adequate notice been given to all those asked to attend, with coordinates of the meeting space included? If the meeting is being held over a meal, let folks know if food and beverages are being served.

Meeting space:

Does the meeting space encourage the meeting chair/facilitator and the participants to effectively

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see, hear, and communicate with everyone present?

Is the space comfortable? (consider temperature, refreshments, seating, and so on)

Technical issues: Have technical issues been tested and, when necessary, resolved? This includes testing remote connections, teleconference equipment, and computer setup.

It is highly recommended to replicate the team environment by dialing in the remote locations and running the computer-based applications in a rehearsal format prior to the actual meeting.

Do you have contact numbers or a team member (including yourself) on hand who can handle technological glitches as they arise?

If teleconferencing, make sure the teleconferenced member is not "left in the dark" by providing them with clear directions on when to contribute. This may seem awkward at first, but from the perspective of a caller on the line and the members sitting at the meeting, it can be a challenge to contribute fully without clear cues. Videoconferencing allows participants to follow non-verbal cues.

Providing an agenda helps prevent confusion over who is addressing topics, provides reasons to attend the meeting (either in topics of interest on the list, or if members see they are assigned to present) and gives structure to the meeting so that time is used well.

The agenda should include a one-sentence description of the meeting goal/objectives with a list of the topics to be covered. Each topic should include a brief description of the issue, who will address it, and the amount of time estimated for discussion.

Send the agenda to participants before the meeting so they may offer feedback or add agenda items, prepare for the meeting, and be ready to work together.

Follow the agenda closely during the meeting.

Most teams will have ground rules that respect members' time.

If someone comes in late, refrain from recapping what the team has covered—doing so sends the message that it is okay to be late for meetings and wastes valuable time. What should you do if an important member comes in late? Offer to discuss the work of the team "offline" (i.e. after the meeting is over). For habitual latecomers, request their notes/reports ahead of time so you may review their work without their presence at the meeting, and move ahead with the collective work of the team.

State a finish time for the meeting and do not run over. To help finish at the stated time, arrange your agenda in order of importance so that if you have to omit or rush through items, you will have discussed the important topics. Unfinished business can be placed on the next meeting agenda or assigned to sub-committees to report at the next meeting.

4. Open with member "check-in"

Take 5-10 minutes at the beginning for members to check-in with the teams. "Checking-in" opens with an invitation to contribute to the opening of the meeting. As an invitation, members should be offered the option of a pass. The check-in step has been described as an investment in relationship-building with the potential to pay large dividends in efficiency and performance (Principles and Practices of Relationship-Centered Meetings PDF —Suchman and Williamson, 2007*)*.

The opening check-in brings busy people into the purpose of the meeting and allows them to share distractions so that they can receive support or put issues aside for the meeting. It allows them to be more fully present in the discussions of the team. Depending on the dynamics of the team, this can include appropriate elements of personal as well as professional life. They can be a simple "Tell us how you are doing or how you are thinking about the team's activities" or can be more purposeful.

Check-in questions that bring members to the professional focus of the meeting include: "What do you hope gets accomplished today? What has been your experience with [the issues on the agenda]?"

Check-in questions that support the development of team performance: "Compliment a team member for his or her contributions at the last meeting." "Tell us something you are comfortable sharing about yourself that most of us probably do not know about you." "What did you find most helpful from our last meeting that you would like to see repeated today?"

5. Establish or review ground rules

A team sets ground rules for what it expects in terms of general courtesy and responsibility for behavior. These form the basis for future team meeting interactions, and should be reviewed periodically (preferably at each meeting). Consider the following ground rule categories while collectively determining rules for your team:

Attendance: Who gets notified if a member is unable to attend?

Promptness: Start and end on time.

Participation: Everyone's viewpoint is valuable; build upon each other's ideas.

Interruptions: How will members handle phone calls and pages? (Agree to turn devices to mute? Step outside the room for calls that must be answered immediately?)

Conversational Courtesy: Listen attentively and respectfully to one another; don't interrupt; hold one conversation at a time.

Accountability: Team members should be empowered to discuss the application (or lack) of the ground rules during the meeting.

Confidentiality: The "Vegas Rule"—What happens here, stays here, unless published in a public record.

6. Assign administrative roles

Clarity in team member roles leads to increased team effectiveness and cohesion. It provides a needed structure, and allows meetings to start and finish on time with productive time spent together. On a rotating basis, pre-assign or seek volunteers for each of the following important roles:

Timekeeper: Assists the team leader or facilitator in managing time. Give verbal reminders of the current time or time left available. The timekeeper can make "5 minute warning" cards and hold them up at the appropriate times during each topic discussed.

Recorder: Captures and transcribes (in real-time or later) key decisions, action plans, and a meeting summary. The style of the minutes issued depends on the circumstances—in situations of critical importance, detailed minutes may be required. Where this is not the case, then minutes are simple lists of decisions made and action items identified for follow-up with the person responsible named by each action item. Generally, minutes should be as short as possible with all key information recorded. This makes notes quick and easy to prepare and review. A template for team meeting records can help organize and make reading the minutes easier.

Facilitator: Focuses on asking instead of telling, listening attentively, and building consensus among meeting participants. It is a collaborative style of leadership and a core skill for leaders as well as team members to exhibit. The facilitator should ensure effective participation, avoid too much or too little contribution from individual members, and keep the conversation flowing in the direction of the team's goals. When the timekeeper warns that the time for an agenda topic is almost over, the facilitator summarizes the discussions and the recommendations on that agenda topic and moves on to the next item on the agenda. Do not finish any discussion without deciding how to act on it. Ingrid Bens (2000) has developed a very useful tool to facilitate core practices for open conversation.

7. Summarize decisions and assign action items

When an agenda item is resolved or a mutually agreeable action plan is established, make it clear who at the meeting will be responsible for the action task. To reduce confusion and misunderstandings, summarize and document these actions in the meeting minutes.

8. Debrief: Evaluate and plan for improvement

Time is well spent wrapping up your meeting with an assessment of process and progress, and then using the information shared to plan to improve the next meeting. Task-level monitoring can lead to immediate and significant improvements in how the task is run. Team-level evaluation is more involved, but it can surface issues felt by individuals; open up productive lines of discussions; and lead to improvements in team processes. Note that the template for team meeting records includes wrap-up questions to facilitate this final step.

Task Progress: Compare the team's progress against specific goals and set task goals for the next session:

> What has the team accomplished?
> Has it met its task goals?
> What aspects of the project or task are presenting unusual challenges?
> Are action plans achievable?

Team Process: Assess team's ability to work together and set goals and roles for the next session.

> What went well today? What needs to be improved? (consider communication, decision making, resources, accountability, guidance, etc.)

9. Distribute meeting minutes promptly

Minutes record the decisions of the meeting and the actions for follow-up. Minutes are a visible means of measuring and monitoring whether individuals assigned to tasks have completed those tasks. They serve as a reminder for all to track whether tasks have been finished by those with designated responsibilities.

Effective Team Meetings Require Effective Team Members

"Knowing is not enough; we must apply. Willing is not enough; we must do."
—Goethe

On a team, leadership is shared. Members rotate roles and everyone takes responsibility for accomplishing shared goals. Members lead one another and improve the meeting's quality when they:

> Establish and ensure each other's commitment to clear **mutual goals.**
> **Communicate** ideas and feelings accurately and clearly (be willing to listen, question, and speak).
> Encourage other members to **actively participate**, acknowledge others' contributions.
> **Influence each other** based on expertise, access to information, and ability, not on authority -

power is distributed equally throughout the team.

Match **decision-making** procedures with needs of the situation.

Engage in **constructive controversy** by disagreeing and challenging ideas or proposals through discussion, thus promoting creative decision-making and problem solving.

Act on behalf of the team rather than on your own behalf. **Adopt a "we instead of me" approach.**

Stay aware of the team's **task goals and time**. Maintain high standards and recognize achievement, large and small.

Establish and maintain harmonious **interpersonal relations**, based on understanding and respect for differences.

Effective team work can be challenging. Table 1 identifies typical challenges associated with, and give suggestions about, ways to intervene to help them become more functional team members. Note: these interventions work best when all team members are aware and engaged in effective process.

Challenges in Running an Effective Team Meeting

Challenges	Intervention Options
Confusion over who is responsible for what	See section on assigning roles, and creating minutes; have the recorder clarify what was said if applicable Regroup, clarify, assign, and document responsibilities in the minutes
People getting stuck in handling or too comfortable in (volunteering for) the same roles	Team members should be aware of this and may even use humor to "call out" a member who keeps volunteering for the same task
"Social Loafing": The team becomes too large and members do less or "Free Rider Effect": A member reduces his or her contributions because he or she feels able to reap the benefits of the group	This can lead to decreased productivity overall since the more productive members may also scale back their efforts in response. More importantly, however, it undermines the dynamic of the team by affecting individual responsibility. Pay attention to the composition of the team Create an atmosphere of mutual accountability where everyone feels valued and encouraged to contribute equally

Conclusion

The skills of managing team meetings are fundamental to productive teamwork and usually easy to learn and simple to adopt. The way to a well-facilitated meeting that promotes open communication, creativity, and consensus-building among its members is the same as the answer to the question of how one gets to Carnegie Hall: "Practice, practice, practice!"

Similarly, using the tools in this lesson will, with practice, lead your team to its peak performance.

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